Alberta Tourism Market Monitor

Strong visitation for historical sites and museums, national parks in August

Alberta's historical sites and museums welcomed an impressive 194,000 visitors in August, an increase of 13.5% from the same month last year. This is the highest increase for historical sites and museums this year.

For more information, please contact Emily Wang at tourism.research@gov.ab.ca or 780-427-6206

Alberta's national parks have also enjoyed strong visitation this summer. Elk Island National Park experienced a dramatic increase in visitor traffic welcoming nearly 92,000 visitors in July (up by a whopping 70% from last year) and more than 88,000 visitors in August (up by an impressive 68%).

Waterton Lakes National Park visitation increased by 25% and 12% in July and August, respectively. The recent wildfire in the park and its subsequent closure will impact this performance, however. The park typically has substantial visitation in September before tapering off in the shoulder and winter seasons.

Corresponding to the robust parks visitation, the Alberta Resorts region experienced the province's highest room rate increase for July (+14%). The occupancy rate was a stellar 92.9% and was similar to the rate recorded in July 2016 (93.1%). Edmonton's occupancy rate bounced back with an increase of 1.5 points in July following a decrease of 5.7 points in June. The occupancy rate for the Other Alberta region (which includes Lethbridge, Red Deer and other Alberta communities) increased by 4.7 points in July over the same month in 2016.

Total arrivals and departures at Calgary and Edmonton International Airports continued to grow in July 2017 at 1.6% and 6.7%, respectively, over the same month in 2016.

New look for Alberta Market Monitor

Based on feedback from readers and users, this edition of the Alberta Market Monitor features a new look with infographics of the key tourism performance indicators for the province. This fall, the Alberta Market Monitor will transition to an infographics- and charts-only format. The goal is to provide readers and users with a comprehensive and easy-to-use data set that can be applied towards financial forecasting, business planning and more.

We welcome your feedback to further enhance this publication and meet your needs. Please share your feedback to tourism.research@gov.ab.ca.

Alberta Tourism Market Monitor

+ 3.1%
(YYC & YEG only)

AIR PASSENGERS
(Arrivals and Departures) July 2017

+3.3%

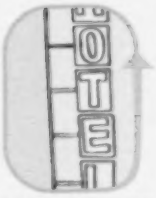
HIGHWAY COUNT
August 2017

+7.3%
(Banff, Jasper & Waterton only)

NATIONAL PARKS ATTENDANCE
June 2017

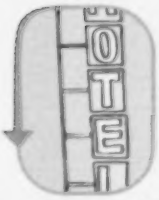
+4.9%
(Accommodation and food services)

EMPLOYMENT
August 2017



+2.4 pts
(Total Alberta excluding Resorts)

OCCUPANCY RATE
July 2017



-0.9%
(Total Alberta excluding Resorts)

AVERAGE DAILY ROOM RATE
July 2017

+4.1%

RECEIPTS, FOOD SERVICES & DRINKING PLACES
June 2017

+13.5%

HISTORIC SITES & MUSEUMS ATTENDANCE
August 2017

.79 USD
.67 EUR
.61 GBP

EXCHANGE RATES
August 2017

$48.04
(USD/barrel)

OIL PRICE
(WTI)
August 2017

$444
(millions)

MAJOR TOURISM PROJECTS
August 2017

Alberta Government

tourism.alberta.ca
Sept 2017

2017Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2017 (000's of arrivals and departures) [1]													
Edmonton International Total	572.5r	549.5r	608.9r	604.5r	615.8r	592.3r	668.4p	**722.8p**					**4,954.7p**
Per cent change from 2016	1.8%	-0.8%	5.3%	13.0%	4.0%	1.5%	6.7%	**8.0%**					**5.0%**
Domestic	427.2r	412.4r	462.8r	461.7r	523.1r	522.2r	597.4r	**632.9p**					**4,039.6p**
Per cent change from 2016	6.8%	3.6%	8.5%	15.6%	6.2%	4.9%	6.9%	**8.0%**					**7.4%**
Transborder	84.8r	83.4p	90.5p	87.0p	64.6p	48.8r	61.5p	**61.1p**					**581.7p**
Per cent change from 2016	-12.6%	-12.4%	-5.2%	1.2%	-8.5%	-22.5%	2.1%	**6.9%**					**-6.9%**
International	60.5p	53.7p	55.6p	55.8p	28.1p	21.4p	29.5p	**28.8p**					**333.5p**
Per cent change from 2016	-7.4%	-12.1%	-1.0%	12.3%	-2.2%	-6.2%	14.8%	**10.5%**					**-0.7%**
Calgary International Total	1,234.3r	1,192.3p	1,320.0p	1,296.8r	**1,298.5r**	**1,375.2r**	**1,573.5p**						**9,291.0p**
Per cent change from 2016	2.2%	-0.1%	1.2%	8.2%	**3.2%**	**4.0%**	**1.6%**						**2.8%**
Domestic	829.6r	796.5p	874.3p	881.6r	**941.3r**	**990.3r**	**1,137.2p**						**6,450.9p**
Per cent change from 2016	2.0%	-1.9%	-2.2%	5.3%	**2.2%**	**2.4%**	**1.3%**						**1.3%**
Transborder	237.9p	243.5p	279.9p	255.6p	243.7	262.1	**296.3p**						**1,819.2p**
Per cent change from 2016	0.6%	2.7%	6.4%	15.0%	8.2%	8.8%	**2.0%**						**60.4%**
International	166.9r	152.3p	165.8p	159.6r	113.6	122.8	**140.0p**						**1,021.0p**
Per cent change from 2016	5.8%	5.0%	12.3%	14.9%	1.7%	7.7%	**2.7%**						**7.3%**
Fort McMurray International Total	58.1p	54.9p	61.6p	63.0p	64.6p	**61.1p**							**363.3p**
Per cent change from 2016	-14.5%	-22.7%	-19.4%	-12.7%	n/a*	**32.5%**							**5.8%**
Highway Count 2017 (000's of vehicles) [2]													
Hwy 1 - Sask border w-bound	57.7	57.7	65.3	74.8	81.1	87.3							423.9
Per cent change from 2016	1.1%	0.4%	-8.0%	11.3%	2.4%	4.6%							2.0%
Hwy 1 - Banff Pk Gate (2-way)	538.7	525.2	591.6	615.4	722	775.3							3768.2
Per cent change from 2016	-0.6%	-4.6%	-5.5%	7.3%	5.3%	4.6%							1.3%
Hwy 16 - Jasper Pk Gate (2-way)	89.8	87.7	110.3	121	152.2	186.8							747.8
Per cent change from 2016	-0.3%	-1.5%	-7.2%	5.8%	2.1%	7.6%							1.7%
Hwy 16 - Blackfoot w-bound	143.9	141.8	160.4	161.4	180.3	184.7							972.5
Per cent change from 2016	0.0%	1.9%	0.1%	0.4%	3.1%	5.4%							1.9%
National Park Attendance (000's of visitors) 2017 [3] Does not include Group Tours													
Banff	201.7	201.6	228.4	267.8	320.0	370.6							1590.1
Per cent change from 2016	2.6%	-5.0%	-4.5%	10.4%	6.5%	6.0%							3.2%
Jasper	51.2	52.0	64.9	151.1	186.3	224.5							730.0
Per cent change from 2016	0.3%	-5.8%	-9.4%	7.7%	3.3%	6.2%							2.9%
Waterton Lakes	9.2	9.6	12.7	20.4	56.3	92.4	**162.7**	**137.0**					**500.3**
Per cent change from 2016	8.7%	-16.9%	-3.3%	4.1%	34.4%	15.5%	**24.5%**	**12.0%**					**17.0%**
Elk Island	17.9	18.8	22.6	26.3	69.9	68.6	**91.9**	**88.6**					**404.6**
Per cent change from 2016	29.6%	16.4%	16.5%	-5.7%	94.0%	70.9%	**69.9%**	**67.8%**					**55.4%**
Wood Buffalo	0.02	0.01	0.01										0.05
Per cent change from 2016	214.3%	-72.2%	-39.1%										-34.3%
Employment (000's of persons) 2017 Seasonally Adjusted [4]													
Accommodation and Food Services	143.8p	144.9p	146.4p	147.5p	149.2p	150.7p	154.6p	**158.1p**					**149.4p**
Per cent change from 2016	4.4%	6.5%	5.6%	5.8%	5.5%	2.6%	6.2%	**4.9%**					**5.1%**

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada and Statistics Canada.

Accommodation Indices for Major Regions 2017 [5]													
	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Edmonton Occupancy Rate	46.8%	56.7%	62.0%	59.6%	55.3%	56.3%	**60.6%**						**56.8%**
Point change from 2016	-3.1	-1.7	0.8	-1.0	-19.2	-5.7	**1.5**						**-3.9**
Average Daily Room Rate	$128.56	$133.48	$133.13	$132.44	$130.55	$128.54	**$126.3**						**$130.49**
Variance from 2016	-1.0%	0.1%	0.3%	0.7%	4.7%	-0.1%	**-0.6%**						**0.8%**
Revenue per available room	$60.13	$75.67	$82.48	$78.87	$72.22	$72.42	**$76.48**						**$74.09**
Calgary Occupancy Rate	42.5%	50.8%	53.0%	56.1%	58.9%	67.0%	**76.9%**						**58.0%**
Point change from 2016	-3.1	0.5	-0.4	-0.3	-4.4	-0.7	**-1.2**						**-1.3**
Average Daily Room Rate	$134.61	$138.79	$138.10	$139.35	$145.41	$151.16	**$166.01**						**$146.61**
Variance from 2016	-4.7%	-1.5%	-1.2%	-3.3%	2.8%	-4.1%	**-0.7%**						**-1.6%**
Revenue per available room	$57.15	$70.45	$73.26	$78.16	$85.65	$101.23	**$127.63**						**$85.02**
Alberta Resorts Occupancy Rate	42.9%	53.2%	56.4%	53.7%	68.4%	84.5%	**92.9%**						**65.2%**
Point change from 2016	0.2	-1.0	0.7	6.2	4.1	0.2	**-0.4**						**1.7**
Average Daily Room Rate	$195.37	$206.57	$198.74	$190.13	$224.58	$313.61	**$375.65**						**$260.52**
Variance from 2016	6.8%	6.5%	2.4%	7.0%	6.8%	13.5%	**13.9%**						**9.5%**
Revenue per available room	$83.72	$109.80	$112.13	$102.18	$153.64	$264.95	**$348.96**						**$169.88**
Other Alberta** Occupancy Rate	37.4%	42.0%	46.0%	42.1%	47.0%	54.1%	**56.5%**						**46.6%**
Point change from 2016	2.2	2.7	6.1	2.9	4.2	5.8	**4.7**						**4.2**
Average Daily Room Rate	$115.85	$115.98	$115.99	$116.30	$116.84	$117.84	**$122.49**						**$117.86**
Variance from 2016	-5.2%	-6.0%	-3.8%	-1.0%	2.3%	-4.9%	**-1.2%**						**-2.8%**
Revenue per available room	$43.33	$48.72	$53.38	$48.93	$54.96	$63.80	**$69.16**						**$54.95**
Total Alberta (excl. Resorts) Occupancy Rate	41.6%	48.9%	52.8%	51.1%	52.9%	58.6%	**63.8%**						**52.8%**
Point change from 2016	-0.8	1.0	3.0	1.2	-4.5	0.9	**2.4**						**0.6**
Average Daily Room Rate	$125.81	$129.01	$128.57	$129.04	$130.30	$132.14	**$139.42**						**$131.04**
Variance from 2016	-3.9%	-2.4%	-1.7%	-1.3%	3.0%	-3.4%	**-0.9%**						**-1.4%**
Revenue per available room	$52.33	$63.03	$67.83	$65.93	$68.87	$77.46	**$88.93**						**$69.20**

Accommodation Indices for Selected Cities or Towns 2017 [5]												
Occ%= Occupancy Rate **ADR**= Average Daily Room Rate **RevPar**= Revenue Per Available Room	July			Year-To-Date				July			Year-To-Date		
	Occ%	ADR	RevPar	Occ%	ADR	RevPar		Occ%	ADR	RevPar	Occ%	ADR	RevPar
Airdrie	**72.0%**	**$112.15**	**$80.75**	**42.3%**	**$100.58**	**$42.51**	Banff	**91.1%**	**$327.93**	**$298.69**	**73.2%**	**$226.47**	**$165.68**
Bonnyville	**40.6%**	**$102.38**	**$41.61**	**34.9%**	**$105.27**	**$36.75**	Canmore	**92.4%**	**$253.49**	**$234.29**	**60.0%**	**$163.37**	**$98.11**
Drayton Valley	**55.8%**	**$111.65**	**$62.30**	**46.1%**	**$110.18**	**$50.82**	Drumheller	**82.5%**	**$157.66**	**$130.11**	**38.9%**	**$135.22**	**$52.61**
Edson	**71.4%**	**$113.86**	**$81.34**	**58.4%**	**$111.55**	**$65.17**	Fort Mac	**52.0%**	**$140.10**	**$72.87**	**53.0%**	**$144.21**	**$76.38**
Fort Saskatchewan	**29.0%**	**$106.55**	**$30.87**	**28.4%**	**$110.21**	**$31.32**	Gr. Prairie	**63.9%**	**$120.55**	**$76.99**	**59.8%**	**$122.43**	**$73.22**
High Level	**53.3%**	**$119.68**	**$63.83**	**44.0%**	**$122.41**	**$53.81**	Hinton	**92.9%**	**$198.75**	**$184.71**	**54.3%**	**$134.61**	**$73.10**
Innisfail	**44.3%**	**$83.34**	**$36.90**	**30.6%**	**$79.07**	**$24.20**	Jasper	**95.9%**	**$326.89**	**$313.51**	**67.3%**	**$225.33**	**$151.66**
Leduc	**50.5%**	**$95.62**	**$48.29**	**48.2%**	**$98.45**	**$47.45**	Lethbridge	**59.0%**	**$111.53**	**$65.77**	**50.6%**	**$108.81**	**$55.04**
Lloydminster	**50.9%**	**$111.27**	**$56.62**	**50.0%**	**$113.50**	**$56.70**	Med. Hat	**73.1%**	**$115.33**	**$84.28**	**52.5%**	**$110.15**	**$57.85**
Nisku	**49.4%**	**$94.32**	**$46.55**	**54.0%**	**$97.42**	**$52.60**	Red Deer	**43.9%**	**$102.90**	**$45.19**	**41.5%**	**$104.47**	**$43.39**
Sherwood Park	**42.1%**	**$125.95**	**$53.05**	**40.3%**	**$126.90**	**$51.16**	Whitecourt	**35.8%**	**$109.11**	**$39.05**	**41.0%**	**$111.63**	**$45.74**
Total Alberta	**66.8%**	**$176.94**	**$118.21**	**54.6%**	**$148.89**	**$81.31**							

Sources: CBRE Hotels Trends in the Hotel Industry National Market Report and STR Inc.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Food Services and Drinking Places 2017 ($ Millions) unadjusted[7]													
Total Receipts for Alberta	690.96r	675.10r	752.82r	**755.04r**	**784.38r**	**790.85p**							**741.53p**
Per cent change from 2016	0.3%	-2.1%	1.6%	**1.6%**	**0.5%**	**4.1%**							**1.0%**
Historic Sites and Museums 2017 (000's of visitors)[8]													
Visitor Attendance***	10.5p	**25.3p**	27.5p	36.9p	70.3r	105.7p	190.1p	**194.0p**					**661.5p**
Per cent change from 2016	-0.9%	**2.9%**	-24.2%	10.8%	-3%****	10.9%	0.1%	**13.5%**					**4.8%**
Exchange Rates 2017[9]													
Canadian Dollar/U.S. Dollar (noon)	0.76	0.76	0.75	0.74	0.73	0.75	0.79	**0.79**					**0.76**
Canadian Dollar/ Euro	0.71	0.72	0.70	0.69	0.67	0.67	0.68	**0.67**					**0.69**
Canadian Dollar/ Great British Pounds	0.61	0.61	0.61	0.59	0.57	0.59	0.61	**0.61**					**0.60**
Oil Price: Western Texas Intermediate (WTI) 2017[10]													
Cushing, OK Spot Price (US Dollar per Barrel)	52.5	53.47	49.33	51.06	48.48	45.18	46.63	**48.04**					**49.34**
Major Tourism Projects Valued $5 million or Greater 2017 ($ Millions)[11]													
Total Value of Hotel Projects Inventory	$666	$499	$449	$450	$450	$444	$444	**$444**					**$444**
Sources: Statistics Canada, Alberta Culture and Tourism, Bank of Canada, WTI, Government of Alberta.													

*Commercial Air Service Suspended from May 5, 2016 - June 10, 2016 due to wildfire in Fort McMurray.

**Other Alberta includes Lethbridge, Red Deer and other Alberta communities.

***Please note some of the historical sites have changed their hours of operation - see Notes section for details.

****Oil Sands Discovery Centre was excluded because of wildfire in Fort McMurray last year.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport has been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport websites.

2. Highway Traffic - These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders count all vehicles by direction. Year to date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only and do not include people travelling as part of a tour group. Tour group data is included in the annual edition of Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay, profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Accommodation indices for Selected Cities or Towns - Destination reports are publications of Smith Travel Research Inc. (STR). Terms and conditions governing the ownership, distribution and use of these Destination Reports and their contents include that no historic data can be published, only current month and year-to-date data.
Source: STR Inc.

7. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the three-digit NAICS level of 722, which includes: full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

8. Historic Sites and Museums - Visitor attendance figures are monthly totals based on 14 historic sites, the Royal Tyrrell Museum of Palaeontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015.
Source: Alberta Culture and Tourism.

9. Exchange Rate - This is the average monthly exchange rate.
Source: Bank of Canada.

10. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

11. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

28-Sept-2017